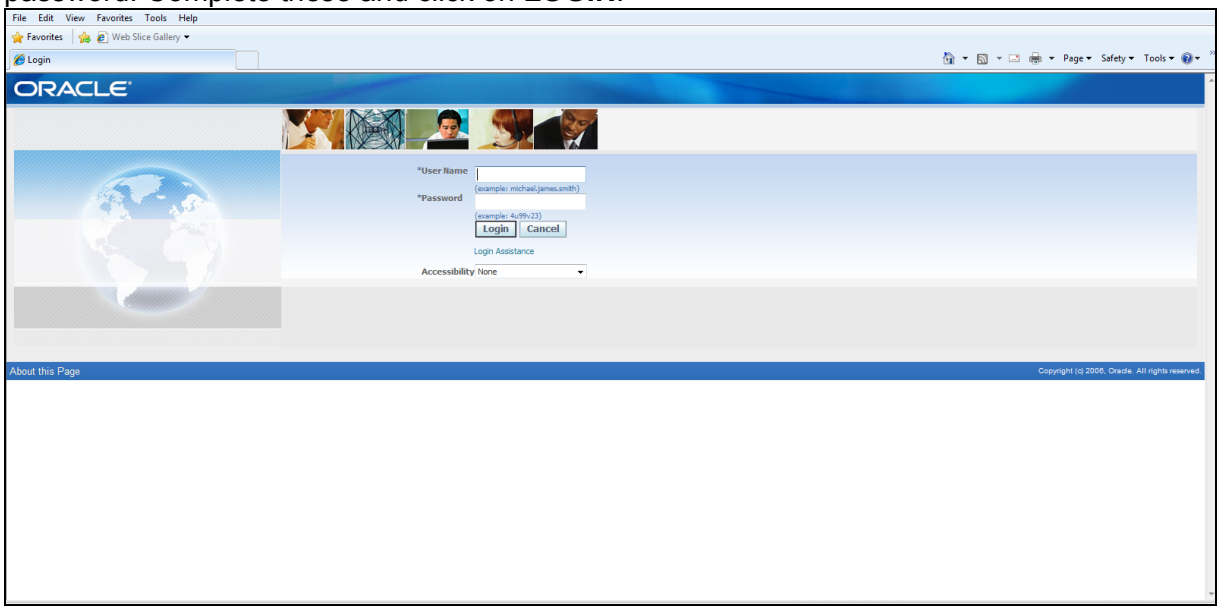
USER MANUAL FOR LEAVERS PROCESS

SECTION 1 - LOGIN

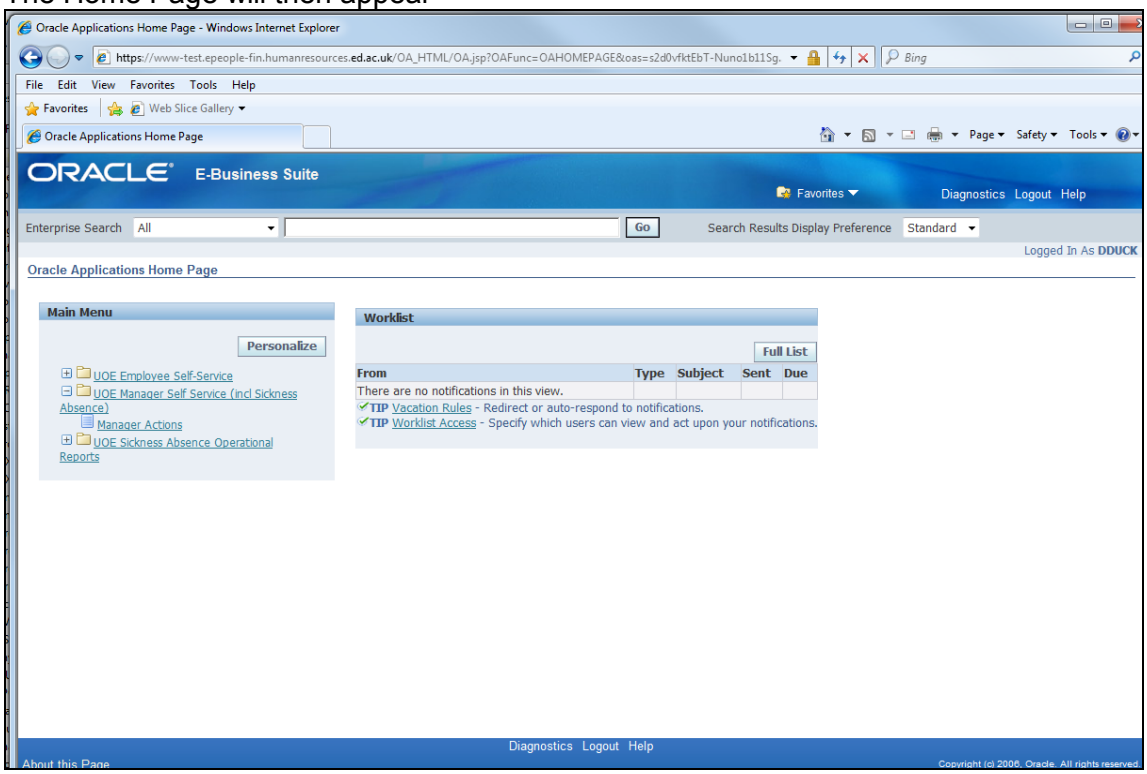
Open up Internet Explorer and go to the following URL:

https://www.epeople-fin.humanresources.ed.ac.uk/OA_HTML/AppsLogin

The login box will then appear with two fields requesting your username and password. Complete these and click on **LOGIN**.



The Home Page will then appear


Oracle Applications Home Page - Windows Internet Explorer
ORACLE E-Business Suite
Favorites
Diagnostics Logout Help
Enterprise Search All Go
Search Results Display Preference Standard
Logged In As DDUCK
Oracle Applications Home Page
Main Menu
Personalize
UOE Employee Self-Service
UOE Manager Self Service (incl Sickness Absence)
Manager Actions
UOE Sickness Absence Operational Reports
Worklist
Full List
From Type Subject Sent Due
There are no notifications in this view.
TIP Vacation Rules - Redirect or auto-respond to notifications.
TIP Worklist Access - Specify which users can view and act upon your notifications.
Diagnostics Logout Help
About this Page
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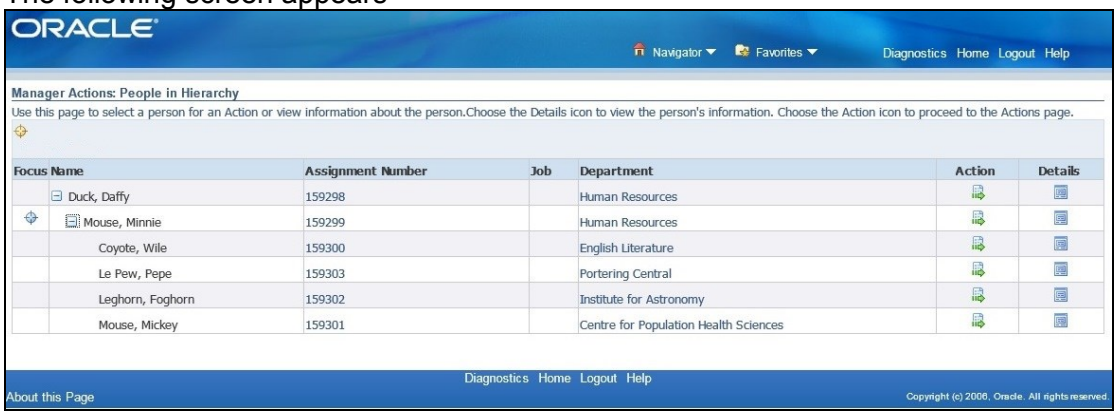
Click on
UOE Manager Self-Service (inc Sickness Absence) then
Manager Actions

Points to remember:

1. This system **MUST NOT** be used to terminate someone who is currently on maternity leave, or who has not returned from maternity leave for 3 months. Contact your local HR team instead.
2. If the employee has multiple posts within the University or is transferring to another job within the University they **MUST NOT** be terminated using this system. Contact your local HR team for advice.
3. If the person being terminated is the supervisor for an area (i.e. they record sickness absence or process terminations), please contact the HR Systems Team before proceeding.

The following screen appears


ORACLE
Navigator Favorites
Diagnostics Home Logout Help
Manager Actions: People in Hierarchy
Use this page to select a person for an Action or view information about the person.Choose the Details icon to view the person's information. Choose the Action icon to proceed to the Actions page.
Focus Name Assignment Number Job Department Action Details
Duck, Daffy 159298 Human Resources
Mouse, Minnie 159299 Human Resources
Coyote, Wile 159300 English Literature
Le Pew, Pepe 159303 Portering Central
Leghorn, Foghorn 159302 Institute for Astronomy
Mouse, Mickey 159301 Centre for Population Health Sciences
Diagnostics Home Logout Help
About this Page
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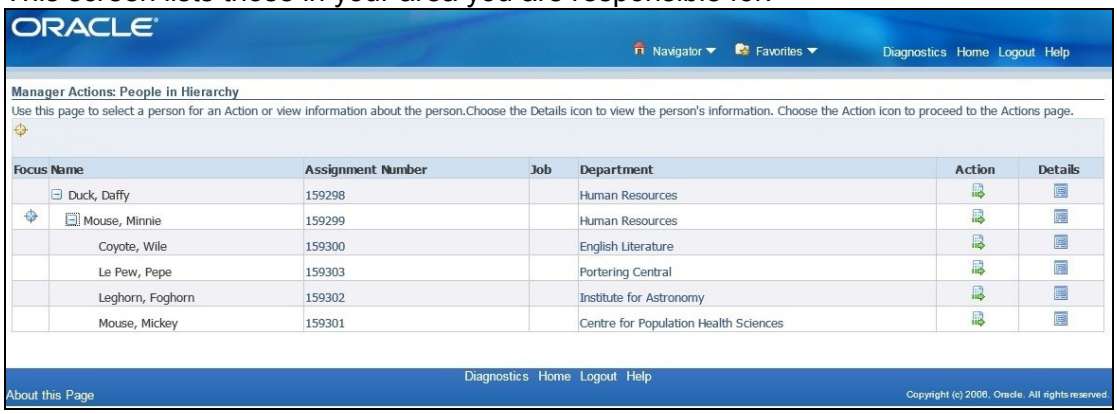
You should now check if the employee's home address is correct or if the address needs to be changed.

SECTION 2 – AMENDING HOME ADDRESS

This screen lists those in your area you are responsible for.


ORACLE
Navigator
Favorites
Diagnostics Home Logout Help
Manager Actions: People in Hierarchy
Use this page to select a person for an Action or view information about the person.Choose the Details icon to view the person's information. Choose the Action icon to proceed to the Actions page.
Focus Name
Assignment Number
Job
Department
Action
Details
Duck, Daffy 159298 Human Resources
Mouse, Minnie 159299 Human Resources
Coyote, Wile 159300 English Literature
Le Pew, Pepe 159303 Portering Central
Leghorn, Foghorn 159302 Institute for Astronomy
Mouse, Mickey 159301 Centre for Population Health Sciences
Diagnostics Home Logout Help
About this Page
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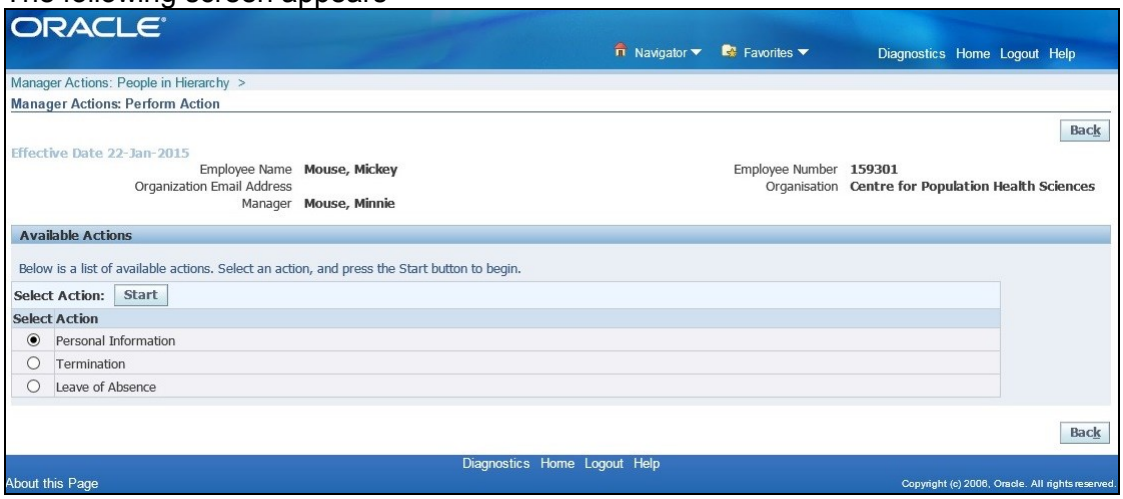
The list is in alphabetical order by surname.*
Find the person on the list whose address you need to change.

Click the Action button

(To view the employee's details click on the Details button)

*You can use the CTRL+F key stroke which brings up a find box in which you can enter a surname or employee number.

The following screen appears



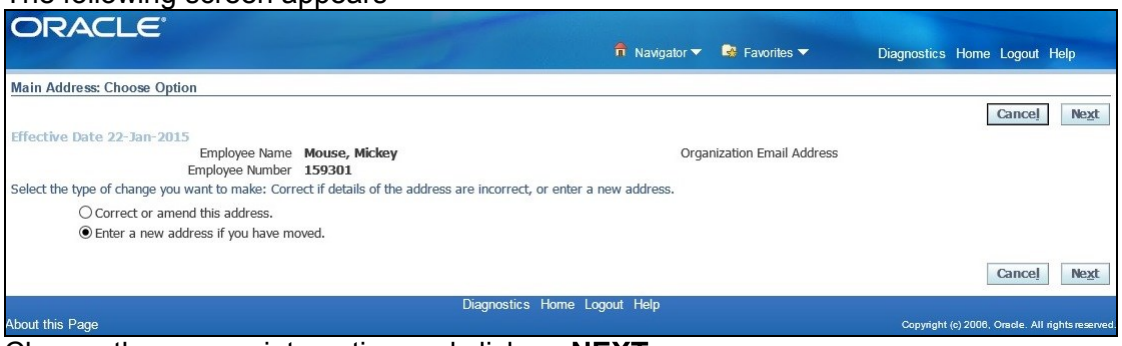
The 'Personal Information' option should be used to check/update the employee's home address BEFORE you action the termination.

Ensure this option is selected and click on **START**

The following screen appears

To update a home address:
Click on the **UPDATE** button (or **ADD** if the employee has no current home address) in the section titled Main Home Address.

The following screen appears


ORACLE
Navigator
Favorites
Diagnostics Home Logout Help
Main Address: Choose Option
Cancel
Next
Effective Date 22-Jan-2015
Employee Name Mouse, Mickey
Employee Number 159301
Organization Email Address
Select the type of change you want to make: Correct if details of the address are incorrect, or enter a new address.
Correct or amend this address.
Enter a new address if you have moved.
Cancel
Next
Diagnostics Home Logout Help
About this Page
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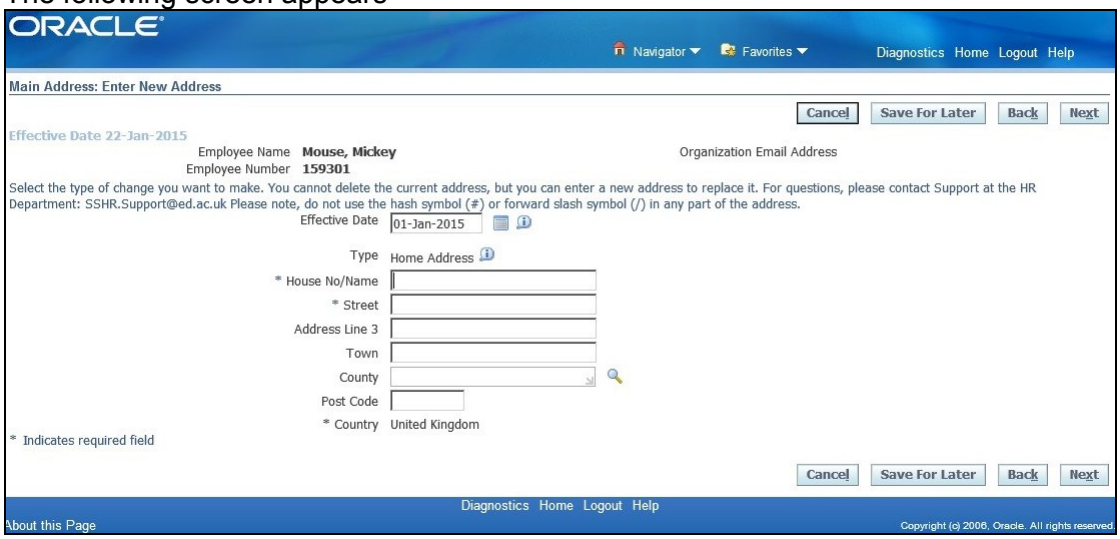
Choose the appropriate option and click on **NEXT**

The following screen appears


ORACLE
Navigator
Favorites
Diagnostics Home Logout Help
Main Address: Enter New Address
Cancel
Save For Later
Back
Next
Effective Date 22-Jan-2015
Employee Name Mouse, Mickey
Employee Number 159301
Organization Email Address
Select the type of change you want to make. You cannot delete the current address, but you can enter a new address to replace it. For questions, please contact Support at the HR Department: SSHR.Support@ed.ac.uk Please note, do not use the hash symbol (#) or forward slash symbol (/) in any part of the address.
Effective Date 01-Jan-2015
Type Home Address
* House No/Name
* Street
Address Line 3
Town
County
Post Code
* Country United Kingdom
* Indicates required field
Cancel
Save For Later
Back
Next
Diagnostics Home Logout Help
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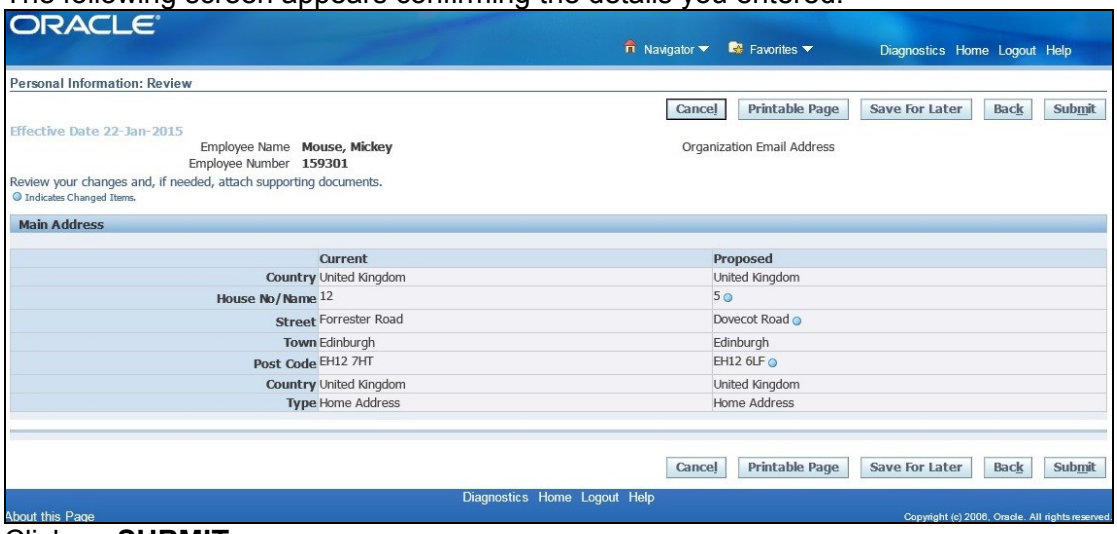
Please complete the fields on the screen. 'Effective date' should be the date the person moved to this address (or the 1st of the month in which the employee is leaving).

As per the on-screen instructions DO NOT use the hash symbol (#)or forward slash symbol (/) in any part of the address.

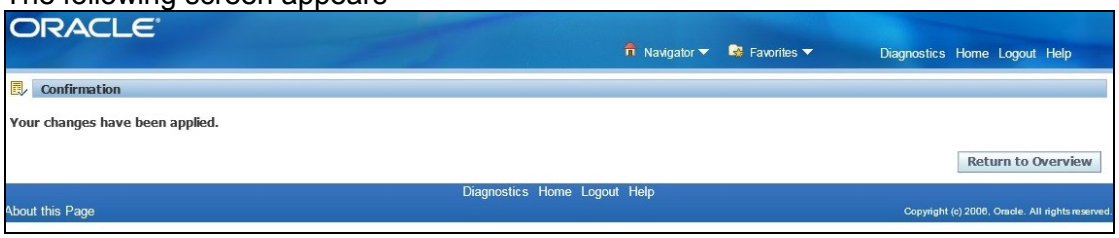
Once you have completed the screen press **NEXT**

The following screen appears confirming the details you entered.



Click on **SUBMIT**

The following screen appears



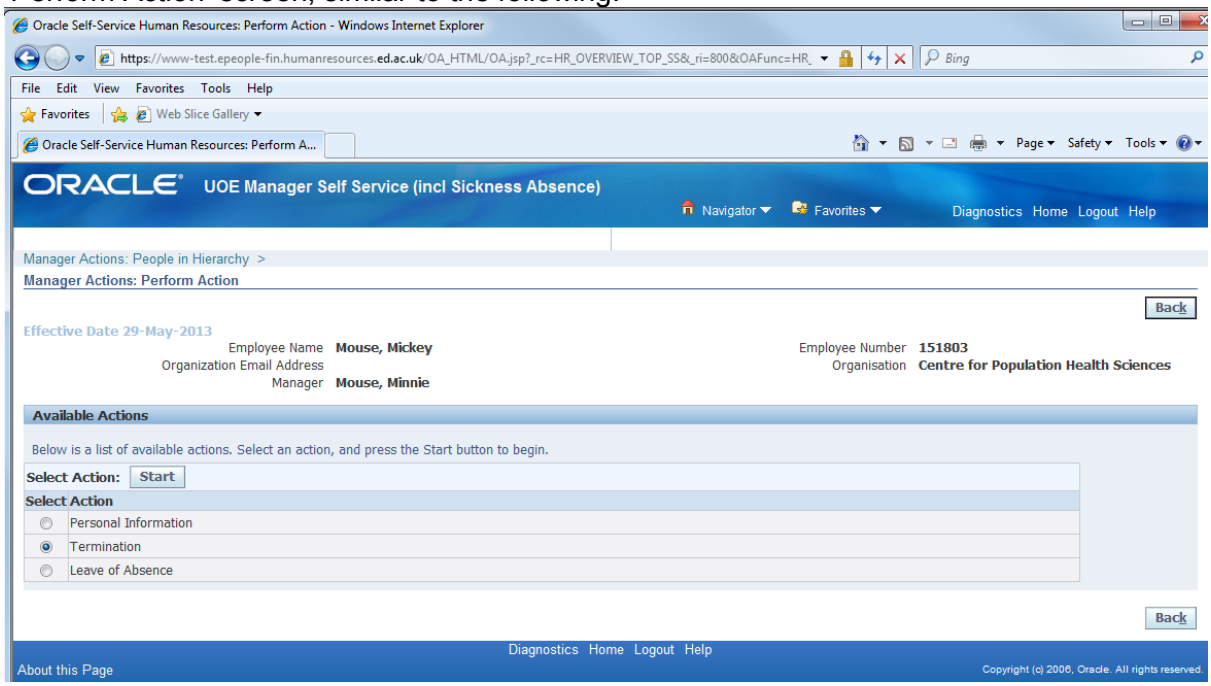
Click on:

RETURN TO OVERVIEW to go back to the employee's personal details screen. If you then wish to continue to terminate the employee, click on **BACK** to go back to the 'Perform Action' screen.

Or **HOME** to return to the main menu.

SECTION 3 – TERMINATING EMPLOYMENT

If you have decided to continue on to terminate the employee, you will see the 'Perform Action' screen, similar to the following:


Oracle Self-Service Human Resources: Perform Action - Windows Internet Explorer
UOE Manager Self Service (incl Sickness Absence)
Navigator
Favorites
Diagnostics Home Logout Help
Manager Actions: People in Hierarchy >
Manager Actions: Perform Action
Back
Effective Date 29-May-2013
Employee Name Mouse, Mickey
Organization Email Address
Manager Mouse, Minnie
Employee Number 151803
Organisation Centre for Population Health Sciences
Available Actions
Below is a list of available actions. Select an action, and press the Start button to begin.
Select Action: Start
Select Action
Personal Information
Termination
Leave of Absence
Back
Diagnostics Home Logout Help
About this Page
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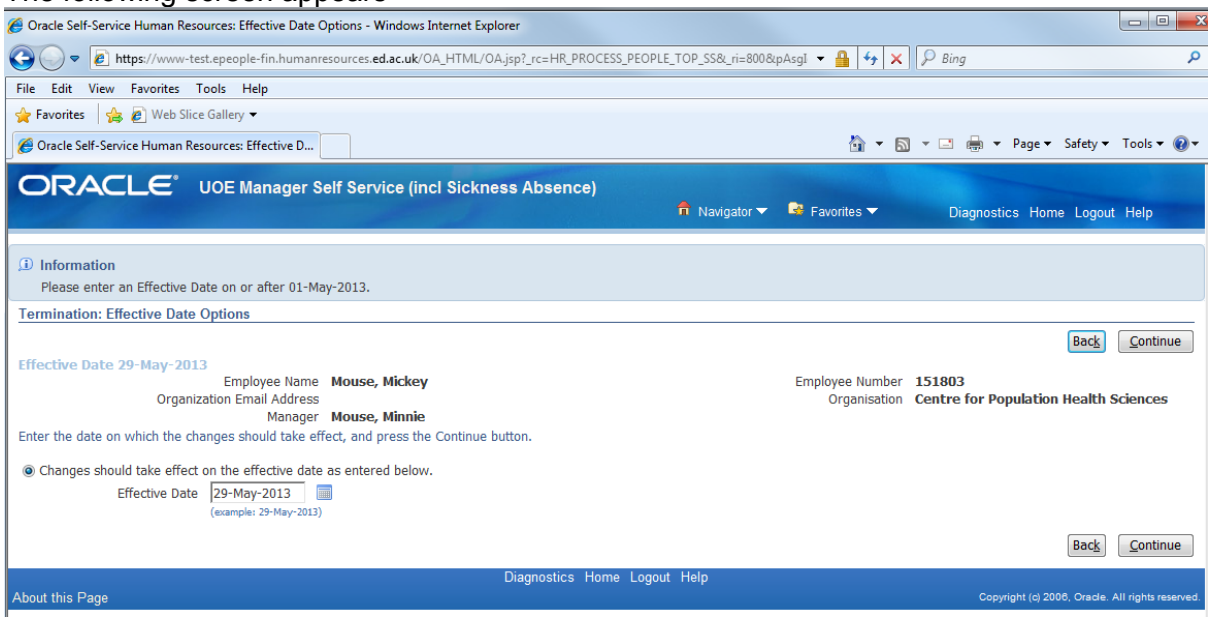
To get to this screen from the main menu, follow the instructions in pages 2 and 3 of this manual.

Click in the radio button next to the 'Termination' option, and click on **START**

The following screen appears


Oracle Self-Service Human Resources: Effective Date Options - Windows Internet Explorer
UOE Manager Self Service (incl Sickness Absence)
Navigator
Favorites
Diagnostics Home Logout Help
Information
Please enter an Effective Date on or after 01-May-2013.
Termination: Effective Date Options
Back
Continue
Effective Date 29-May-2013
Employee Name Mouse, Mickey
Organization Email Address
Manager Mouse, Minnie
Employee Number 151803
Organisation Centre for Population Health Sciences
Enter the date on which the changes should take effect, and press the Continue button.
Changes should take effect on the effective date as entered below.
Effective Date 29-May-2013
(example: 29-May-2013)
Back
Continue
Diagnostics Home Logout Help
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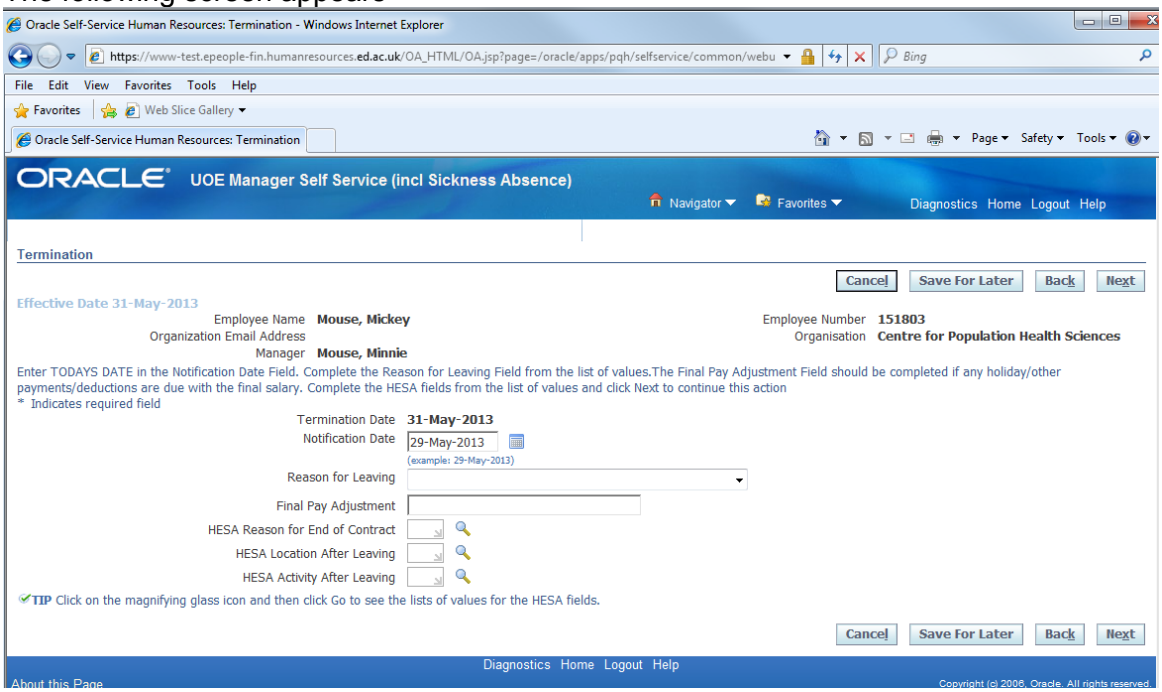
Amend the Effective Date Field to the date the employee is leaving, i.e. **THEIR LAST DAY OF EMPLOYMENT WITH THE UNIVERSITY**. This is done by clicking on the calendar icon and choosing the date, or deleting the date already there and typing the date you require. Date format should be DD-MMM-YYYY (e.g. 01-Jan-2013)

Then click on **CONTINUE**

The following screen appears


Oracle Self-Service Human Resources: Termination - Windows Internet Explorer
ORACLE
UOE Manager Self Service (incl Sickness Absence)
Navigator
Favorites
Diagnostics Home Logout Help
Termination
Cancel
Save For Later
Back
Next
Effective Date 31-May-2013
Employee Name Mouse, Mickey
Employee Number 151803
Organization Email Address
Organisation Centre for Population Health Sciences
Manager Mouse, Minnie
Enter TODAYS DATE in the Notification Date Field. Complete the Reason for Leaving Field from the list of values.The Final Pay Adjustment Field should be completed if any holiday/other payments/deductions are due with the final salary. Complete the HESA fields from the list of values and click Next to continue this action
* Indicates required field
Termination Date 31-May-2013
Notification Date 29-May-2013
(example: 29-May-2013)
Reason for Leaving
Final Pay Adjustment
HESA Reason for End of Contract
HESA Location After Leaving
HESA Activity After Leaving
TIP Click on the magnifying glass icon and then click Go to see the lists of values for the HESA fields.
Cancel
Save For Later
Back
Next
Diagnostics Home Logout Help
About this Page
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Please complete the screen as follows:

- Enter the Notification Date field with TODAY'S DATE;
- Complete the Reason for Leaving field, using the list of values;
- The Final Pay Adjustment Field should be completed if any holiday/other payment/deductions are due with the final salary, e.g. 'plus 21 hours in lieu of holidays'. **Please note that staff are encouraged to take holidays instead of being paid in lieu.** **(See SECTION 7 on how to calculate holidays to be paid)**
- Complete the HESA Reason for End of Contract field, using the list of values;
- Complete the HESA Location After Leaving field, using the list of values;
- Complete the HESA Activity After Leaving, using the list of values;

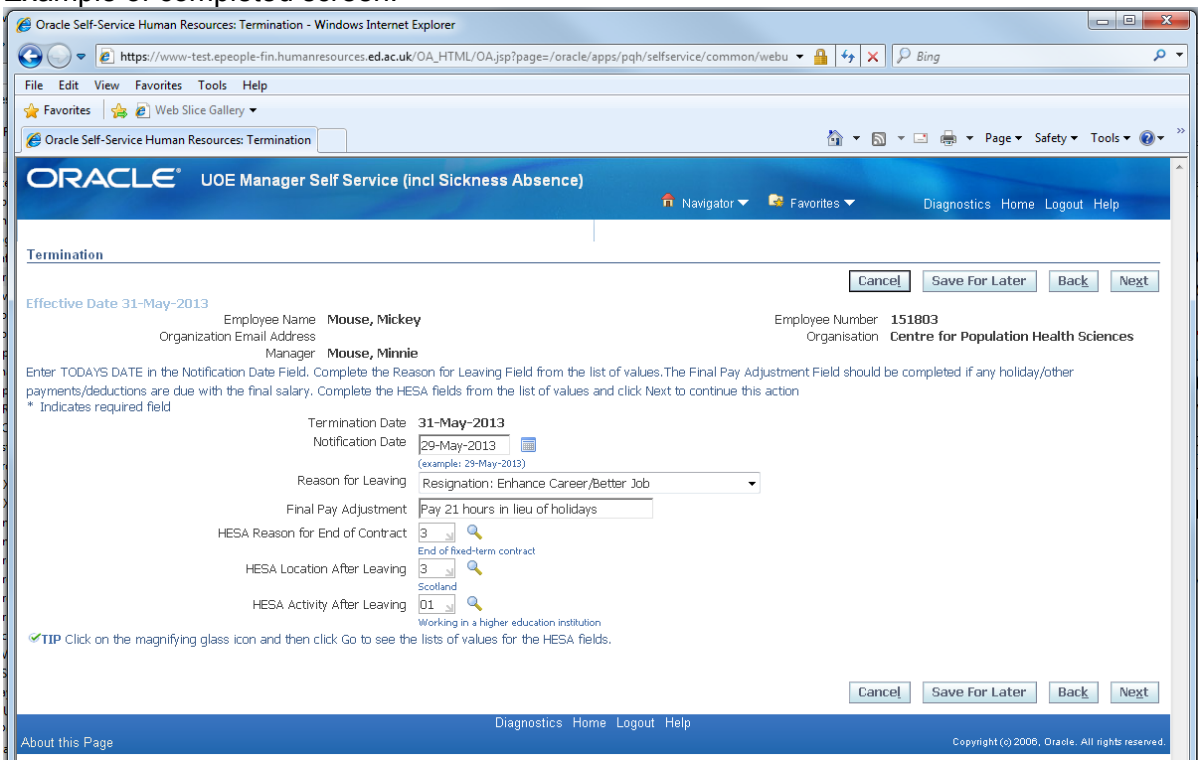
SEE EXAMPLE OF COMPLETED SCREEN ON NEXT PAGE

PLEASE NOTE

The list of valid Reason for Leaving codes can be found in **SECTION 4** of this user manual.

The description of the HESA codes (HESA Reason for End of Contract, HESA Location After Leaving and HESA Activity After Leaving) can be found by either clicking on the magnifying glass icon as per the on-screen instructions, or in **SECTION 5** of this user manual.

Example of completed screen:


Oracle Self-Service Human Resources: Termination - Windows Internet Explorer
UOE Manager Self Service (incl Sickness Absence)
Navigator
Favorites
Diagnostics Home Logout Help
Termination
Cancel Save For Later Back Next
Effective Date 31-May-2013
Employee Name Mouse, Mickey
Employee Number 151803
Organization Email Address
Organisation Centre for Population Health Sciences
Manager Mouse, Minnie
Enter TODAYS DATE in the Notification Date Field. Complete the Reason for Leaving Field from the list of values.The Final Pay Adjustment Field should be completed if any holiday/other payments/deductions are due with the final salary. Complete the HESA fields from the list of values and click Next to continue this action
* Indicates required field
Termination Date 31-May-2013
Notification Date 29-May-2013
(example: 29-May-2013)
Reason for Leaving Resignation: Enhance Career/Better Job
Final Pay Adjustment Pay 21 hours in lieu of holidays
HESA Reason for End of Contract 3
End of fixed-term contract
HESA Location After Leaving 3
Scotland
HESA Activity After Leaving 01
Working in a higher education institution
TIP Click on the magnifying glass icon and then click Go to see the lists of values for the HESA fields.
Cancel Save For Later Back Next
Diagnostics Home Logout Help
About this Page
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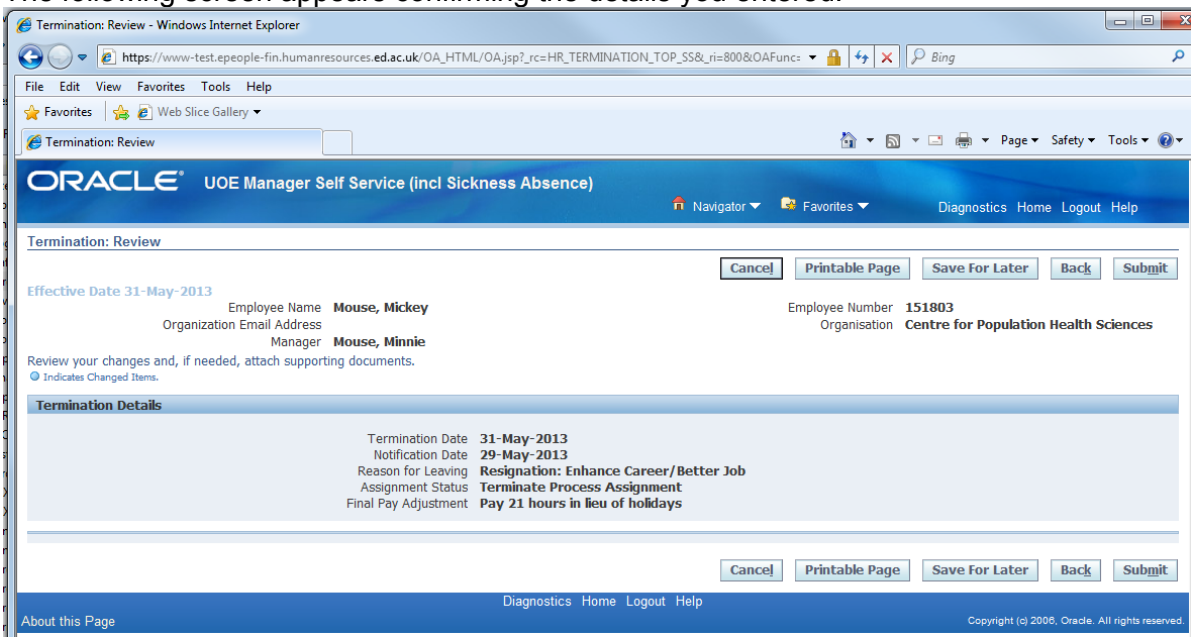
Click on **NEXT**

The following screen appears confirming the details you entered.


Termination: Review - Windows Internet Explorer
UOE Manager Self Service (incl Sickness Absence)
Navigator
Favorites
Diagnostics Home Logout Help
Termination: Review
Cancel Printable Page Save For Later Back Submit
Effective Date 31-May-2013
Employee Name Mouse, Mickey
Employee Number 151803
Organization Email Address
Organisation Centre for Population Health Sciences
Manager Mouse, Minnie
Review your changes and, if needed, attach supporting documents.
Indicates Changed Items.
Termination Details
Termination Date 31-May-2013
Notification Date 29-May-2013
Reason for Leaving Resignation: Enhance Career/Better Job
Assignment Status Terminate Process Assignment
Final Pay Adjustment Pay 21 hours in lieu of holidays
Cancel Printable Page Save For Later Back Submit
Diagnostics Home Logout Help
About this Page
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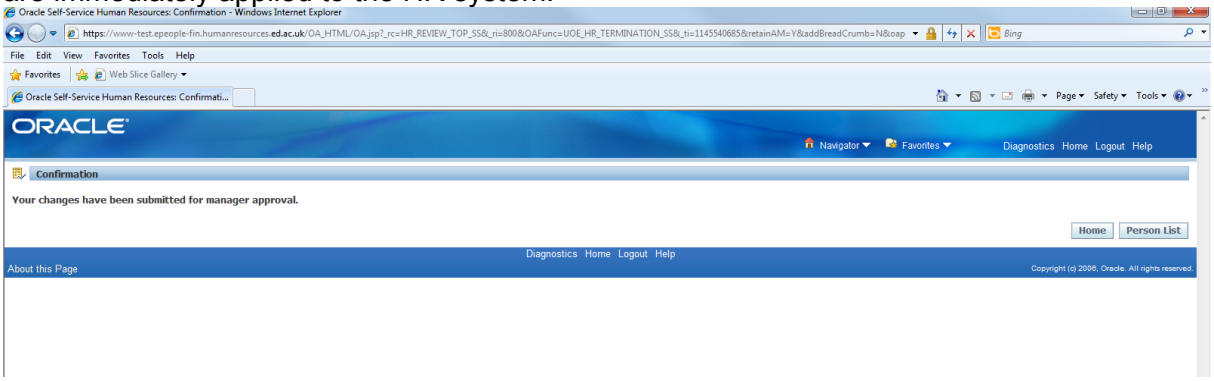
Click on **SUBMIT**

The following screen appears. Please note that changes do not require approval, and are immediately applied to the HR system.



Click on **Person List** or **Home**

AT THIS STAGE IF YOU DISCOVER YOU HAVE TERMINATED THE RECORD FROM THE WRONG DATE PLEASE CONTACT YOUR RELEVANT HR COLLEGE/SUPPORT GROUP TEAM.

SECTION 4 – LEAVING REASON CODES

Employee's Reason For Leaving	
Description	**Code**
Resignation:	
Abandon Contract	RES:AC
Enhance Career/Better Job	RES:MEC
Family Responsibilities	RES:FR
Ill-health	RES:IL
Job Dissatisfaction	RES:JD
Three Months after Maternity Leave	RES:MTH
Not Known	RES:NK

SECTION 5 – HESA CODES

HESA Reason for End of Contract

Description	Code
Continued employment, new HESA contract record generated	1
Atypical contract issued	2
End of fixed-term contract	3
Voluntary redundancy	4
Other redundancy	5
Resignation	6
Retirement (excluding ill-health)	7
Death	8
Other (includes dismissal and ill-health)	9

HESA Activity After Leaving

Description	Code
Working in a higher education institution	01
Working in another education institution	02
Working in a research institute (private)	03
Working in a research institute (public)	04
NHS/General medical practice/General dental practice	05
Working in another public sector organisation	06
Working in the voluntary sector	07
Working in the private sector	08
Self employed	09
Registered as a student	10
Retired	11
Not in regular employment	12
Not known	90

HESA Location After Leaving

Description	Code
England	1
Wales	2
Scotland	3
Northern Ireland	4
UK (not otherwise specified)	5
Other EU	6
Non-EU	7
Not known	8
Information refused	9

SECTION 6 – INSTRUCTIONS ON WHAT TO DO IF LEAVING DATE NEEDS AMENDED

If after submitting the termination the leaving date changes for any reason you should contact your relevant HR/Support Group Team who will reverse the termination for you and once done will contact you in order for you to action the termination again.

SECTION 7 - HOW TO CALCULATE NUMBER OF DAYS HOLIDAY DUE TO BE PAID.

CALCULATION OF HOLIDAY PAY

Holiday pay for leavers is calculated in hours, to ensure that all staff are paid fairly, and to make the process of calculating holiday pay simpler.

Accordingly, you should enter holiday to be paid in hours. To calculate this you should multiply the number of hours that the employee was contracted to work each day, by the number of days of holiday due.

For example, if an employee works 7 hours a day, 5 days a week, and they are due 3 days holiday, you would enter 21 hours.

Holiday for part-time staff, who work less than five days per week, or who work different hours on different days, is normally calculated in hours. For these staff you should simply enter the number of hours to be paid.